YOUR SPREADSHEET IS LYING TO YOU.



A brutally honest guide for growing businesses that are ready to get their operations under control.

DEALS FALL THROUGH

Things get missed. Revenue disappears.

NO ONE KNOWS WHAT'S REAL

Five versions. Zero trust.

YOU'RE ALWAYS PLAYING CATCH UP

Reactive mode is exhausting.

YOUR TEAM DESERVES BETTER

They need clarity. Not chaos.

GROWTH HITS A WALL

Spreadsheets don't scale. Systems do.

DIGITAL BONE STUDIOS

Practical CRM systems for growing businesses

Powered by RUNESHIP CRM FOUNDATION

This Is Not Another Generic CRM Guide

A practical field guide for owners who need clarity, not tech jargon

Most CRM advice makes the topic feel bigger and more complicated than it needs to be. This guide takes a different approach: start with the business problem, build a clean foundation, and expand only after the system is creating value.

! The simple promise

By the end of this guide, you should know whether your business has outgrown spreadsheets, what your first CRM should track, and how to avoid the most common implementation failures.

1 Spot the spreadsheet problem

Know when spreadsheets have moved from helpful tool to business risk.

2 Choose the right starting point

Use the Crawl-Walk-Run roadmap to avoid overbuilding on day one.

3 Launch without losing adoption

Build the CRM around your process so the team actually uses it.

A CRM is not about making your business more complicated.

It is about making your business more visible, consistent, and accountable.

Inside this field guide

- The hidden cost of spreadsheet operations
- What a CRM really does
- The Crawl-Walk-Run CRM Roadmap
- Why CRM adoption fails
- Off-the-shelf vs custom CRM
- The CRM Launch Package

The Meeting That Exposed the Problem

Spreadsheet chaos is not just inconvenient. It can damage trust.

I once watched a manager get torn apart in a meeting with the President of the company because the numbers they presented did not match the numbers on someone else's version of the spreadsheet.

At first glance, that may sound like a small mistake. It was not.

> ? When leadership cannot agree on which version of the data is correct, the spreadsheet is no longer helping the business. It is creating risk.

Now imagine if a prospective customer, lender, partner, or investor had been in that same meeting. Would they walk away believing the company had its operations under control?

That is the real danger of spreadsheet-based operations. It is not just about convenience. It is about trust, consistency, accountability, and whether your business can confidently answer basic questions about its own pipeline.

The hidden issue

Five versions. No single source of truth.

Final.xlsx	Final_v2.xlsx	Updated_Final.xlsx	Copy_of_Final.xlsx	Final_Copy2.xlsx
Different numbers	Different numbers	Different numbers	Different numbers	Different numbers

The Hidden Cost of Spreadsheet Operations

Spreadsheets are useful. They just should not become your operating system.

A spreadsheet might be fine when one person is tracking a few leads. But once multiple people are editing, copying, downloading, emailing, or saving their own versions, you no longer have a system. You have five versions of the truth.

What starts breaking

- Duplicate data
- Outdated reports
- Missed follow-ups
- No clear audit trail
- Limited access control
- Difficulty knowing who changed what
- Customer info scattered across inboxes, notebooks, and computers

What the business loses

- Confidence in the numbers
- Speed in follow-up
- Manager visibility
- Consistent customer experience
- Control over sensitive information
- Knowledge when an employee leaves
- The ability to forecast with confidence

Rule of thumb

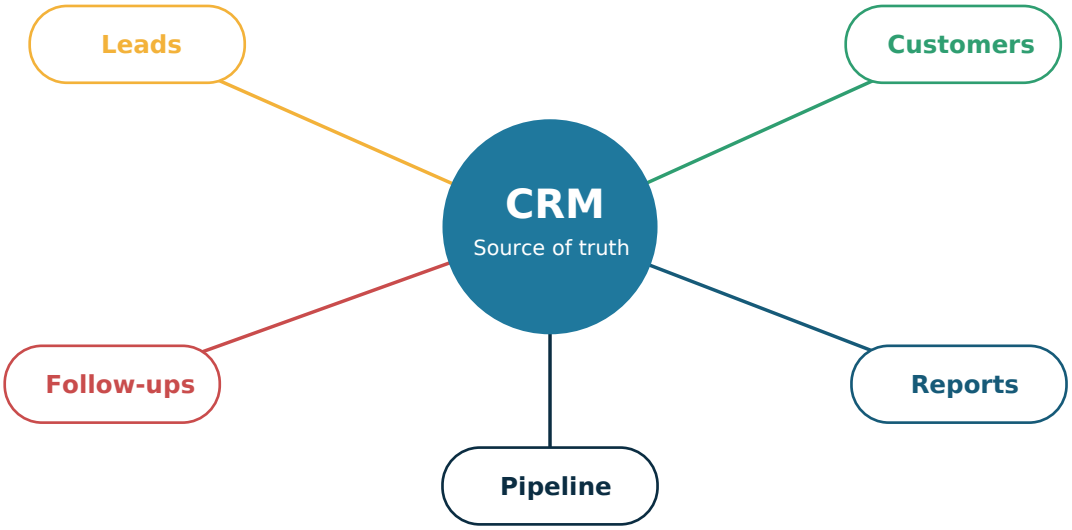
If more than two people are actively editing the same business-critical spreadsheet, it is probably time for a CRM.

What Is a CRM, Really?

A practical definition for business owners

At its simplest, a CRM - Customer Relationship Management system - helps you manage customers, prospects, leads, follow-ups, sales activity, and business relationships in one central place. But that definition barely scratches the surface.

A CRM is not just a digital Rolodex. A well-built CRM gives your business a high-level view of what is happening right now.



A CRM should help answer:

- Who are your active leads?
- Who needs a follow-up?
- Which opportunities are stuck?
- Where is the sales pipeline strongest?
- What does leadership need to know?

CRM Readiness Check

Check the signs that your business has outgrown spreadsheets

You do not need every box checked to benefit from a CRM. Even a few of these signs can mean your current process is costing time, trust, or sales.

Data & visibility

- [ ] More than one spreadsheet version exists
- [ ] Reports take too long to prepare
- [ ] Managers do not trust the numbers
- [ ] Customer info is scattered

Sales & follow-up

- [ ] Leads fall through the cracks
- [ ] Follow-up is inconsistent
- [ ] No one owns the next step
- [ ] Pipeline status is unclear

Process & growth

- [ ] New hires learn by tribal knowledge
- [ ] Duplicate data entry wastes time
- [ ] Owners cannot see activity quickly
- [ ] The business is growing

How to read this

If you checked 1-3 boxes, start with a simple CRM foundation. If you checked 4-7, your process is already leaking time or sales. If you checked 8 or more, your business is likely ready for a formal CRM implementation roadmap.

The Crawl-Walk-Run CRM Roadmap

Start simple. Solve the real problem. Build momentum. Then expand.

One of the biggest mistakes companies make with CRM implementation is trying to do everything at once. They want every feature, every automation, every integration, every dashboard, every workflow, and every department involved from day one. That usually creates confusion, delays, scope creep, and poor adoption.

CRAWL
Get out of spreadsheet chaos
●○○

▶

WALK
Improve process, reporting, and accountability
●●○

▶

RUN
Integrate, automate, and build around the business
●●●

Start with the business problem

Do not start by asking which software to buy. Start by asking which process is breaking.

Protect adoption

A CRM only works when people use it. Design around the way the team actually works.

Build a foundation

Your first CRM should support clean data, reporting, and future integrations.

Crawl: Get Out of Spreadsheet Chaos

Create a simple, reliable place for leads, customers, and follow-ups

The Crawl stage is about creating a clean foundation. The goal is not to automate the entire business. The goal is to stop losing track of leads, customers, and follow-ups.

A Crawl-stage CRM should help you manage:

- Companies
- Contacts
- Leads
- Opportunities
- Basic activity tracking
- Follow-up dates
- Lead stages
- Sales pipeline stages
- Notes and communication history
- Basic reporting

Key shift

Instead of asking, 'Who has the latest version of the spreadsheet?' you can ask, 'What does the CRM say?' That is a major step forward.

Walk: Improve Reporting and Accountability

Once the team is using the CRM, start improving the way the business operates

The Walk stage begins once the team is using the CRM consistently. This is where the CRM becomes a management tool, not just a sales tool.

Better questions

- Are leads followed up with quickly?
- Are opportunities moving through the pipeline?
- Are salespeople logging meaningful activity?
- Are managers getting useful reports?
- Are customers being handed off properly?

Common Walk-stage additions

- Custom dashboards
- Pipeline reports
- Follow-up reminders
- Team activity tracking
- Lead source reporting
- Basic automations
- Role-based access
- Manager-level visibility

The outcome

The business starts to see patterns. The team starts to trust the system. Leadership starts to get better visibility.

Run: Integrate, Automate, and Build

This is where the CRM becomes part of the actual operating process

The Run stage is where a CRM can become much more powerful. This is where the CRM begins connecting to other systems and supporting workflows that match the way the business actually operates.

Email | Calendar | Website forms | Accounting | Payments | Documents | Marketing | Customer portals | Internal databases | External APIs

Real-world lesson: eliminate dual data entry

In one implementation, the sales team was expected to use Salesforce while also entering information into an existing loan origination system. From their point of view, Salesforce felt like extra work. The fix was not to lecture the team. The fix was to make the CRM part of the actual business process.

The shift

Deals started in Salesforce. When an opportunity was marked closed-won, the integration created the corresponding loan package in the loan origination system.

That changed Salesforce from 'another place to enter data' into the starting point for sales pipeline, reporting, dashboards, communication, and team collaboration.

The Biggest CRM Mistake: Ignoring Adoption

The best system in the world fails when people do not use it

The hardest lesson I have learned from implementing business systems is this: it does not matter how good the system is if people do not use it.

> ! If your business cannot see it, report on it, or follow up on it, it might as well not exist.

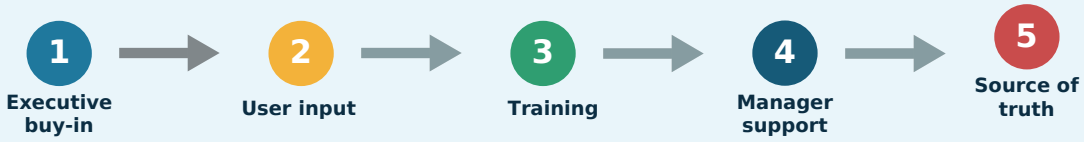
CRM adoption requires buy-in from the top down. Owners, executives, managers, and team leads need to support the process, reinforce usage, and make sure the CRM is not treated as optional.

But adoption is not just about pressure. It is also about design. The CRM should make the team's work easier, not harder.

Real-world implementation experience

- Salesforce enterprise workflow systems
- Loan origination integrations
- CRM adoption strategy
- Pipeline reporting systems
- Workflow automation and integrations

CRM adoption fails when any link in the chain breaks



The operational reality

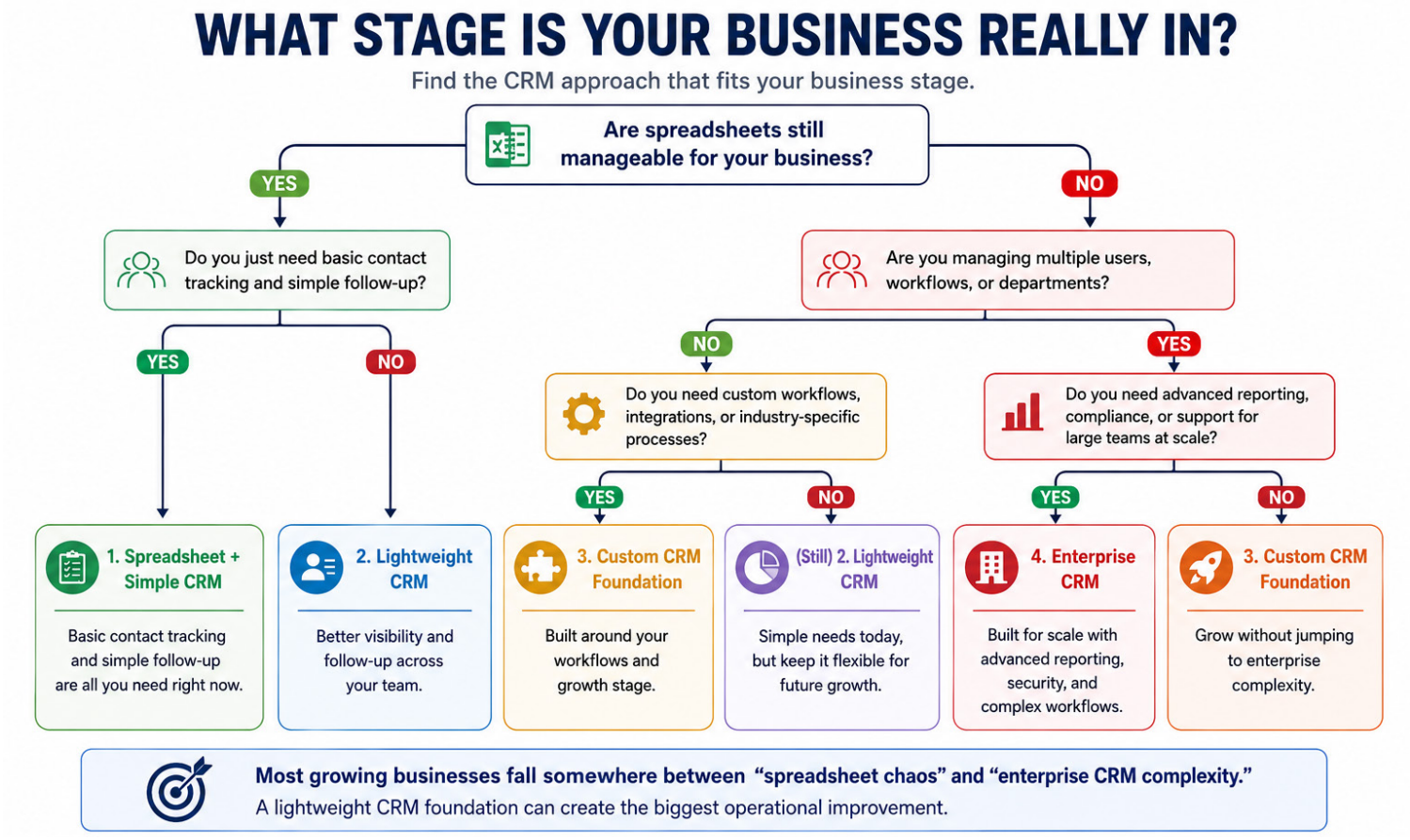
In larger implementations, the mantra eventually becomes: if it is not in the CRM, it did not happen.

Off-the-Shelf CRM vs. Custom CRM

The right answer depends on the business, budget, complexity, and support plan

Salesforce, HubSpot, Zoho, Monday, Pipedrive, and many others can be excellent tools. But they are not always the right fit for every small or mid-size company.

Option	Good fit when...	Watch out for...
Off-the-shelf CRM	You want a proven product, standard CRM workflows, and faster setup with minimal custom development.	Monthly licensing, unused features, customization limits, and complexity that may require admins or consultants.
Enterprise CRM	You need major scale, complex workflow, advanced reporting, large teams, and long-term internal support.	Higher cost, longer implementation, heavier training, and the need for strong top-down buy-in.
Custom CRM	You have outgrown spreadsheets but are not ready for the cost, complexity, or licensing model of a large platform.	Requires a clear scope, thoughtful data model, and a plan for support and future enhancements.



Digital Bone Studios angle

We build lightweight CRM systems for companies that have outgrown spreadsheets but are not ready for Salesforce. Start with the essentials. Expand as the business grows.

What Should Your First CRM Track?

Do not overcomplicate the foundation

A good CRM foundation starts with the basics: companies, people, leads, opportunities, activity, and follow-up. The goal is to turn raw information into business visibility.

C Company

Business records, addresses, industry, account owner, and relationship history.

P Contact

Individual people related to companies, with email, phone, role, and communication history.

L Lead

New inquiries, lead source, status, qualification notes, and next follow-up.

O Opportunity

Potential deals, pipeline stage, estimated value, expected close date, and assigned owner.

Minimum useful fields

- Lead source
- Lead status
- Opportunity stage
- Last contact date
- Next follow-up date
- Assigned owner
- Estimated deal value
- Expected close date
- Activity history

What Digital Bone Studios Does

Practical CRM systems for growing businesses

Digital Bone Studios helps growing businesses solve real operational problems with a smart blend of technology. We are not here to sell software for the sake of software. We help businesses get out of spreadsheet chaos, improve visibility, and build systems that create real return on investment.

Runeship

Our custom CRM foundation, Runeship, gives us a strong starting point for building CRM systems around the way your business actually works.

We help you move from:

Scattered spreadsheets	**One working CRM foundation**
Manual follow-up	**Clear next steps and reminders**
Gut-feel reporting	**Dashboards and pipeline visibility**
Generic templates	**A system shaped around your workflow**

Our best-fit audience includes logistics, transportation, manufacturing, service-based companies, and local businesses with quote or inquiry forms that need better organization and follow-up.

CRM Launch Package

A proven process to replace spreadsheet chaos with a CRM foundation that your team will actually use.

Our goal: Launch a clean, reliable CRM foundation that brings your data together, improves follow-up, and gives you real visibility.

PHASE 1
Foundation Setup
Build the right foundation on day one.

1. **Discovery & Process Mapping**
   We learn your business, map your current workflow, and identify what's working-and what's not.
2. **Spreadsheet-to-System Review**
   We analyze your spreadsheets, data sources, and reports to plan a clean, accurate transition.
3. **Runeship CRM Foundation Setup**
   We configure your Runeship CRM with core objects, fields, user roles, and essential settings.

PHASE 2
Operational Visibility
Turn data into clarity and action.

4. **Lead, Contact, Company, and Opportunity Tracking**
   We build the essential records and pipeline stages so your team can capture, manage, and move opportunities forward.
5. **Dashboard and Pipeline Reporting**
   You get real-time dashboards and reports that answer the questions leadership cares about.

PHASE 3
Adoption & Momentum
Launch with confidence. Build long-term success.

6. **Launch Training Session**
   We train your team, walk through day-to-day usage, and set clear expectations for success.

Included Implementation Accelerators | *More value. Faster results. Lower risk.*

CRM Adoption Checklist
A step-by-step checklist to help your team adopt the CRM and stay consistent.

Prevents: Old habits and low user adoption.

Automation Opportunity Roadmap
A prioritized list of manual tasks you can automate later to save time and reduce errors.

Delivers: Efficiency gains and a clear path for automation.

Spreadsheet Cleanup Strategy
A plan to clean, organize, and standardize your data before it becomes a bigger issue.

Prevents: Duplicate records, messy imports, and bad reports.

Email and Calendar Integration Plan
A roadmap to connect your communication and follow-up workflows into the CRM.

Creates: Seamless follow-up and communication.

30-Day Optimization Review
We review usage, measure results, and fine-tune your system for maximum impact.

Ensures: Continuous improvement and long-term success.

Scope Protection
Advanced items are scoped separately, including:

- Large historical data migrations
- Complex workflow automation
- Custom portals and integrations
- Ongoing CRM administration

Best Fit For

- Businesses with multiple leads and follow-ups
- Teams tired of spreadsheets and confusion
- Owners who want real visibility and control
- Companies ready to build a scalable foundation

Start Simple. Build Momentum. Grow With Confidence.

This package gets you a clean CRM foundation with the systems, training, and support you need to launch successfully-and grow from there.

Ready to get started?
Book your free Spreadsheet-to-CRM Assessment.

Ready to Get Out of Spreadsheet Chaos?

Start with a free Spreadsheet-to-CRM Assessment.

What we will look for

- [ ] Where your current process is breaking
- [ ] What your CRM should track first
- [ ] Which spreadsheets should become workflows
- [ ] Whether a custom CRM foundation makes sense
- [ ] What to automate now vs later

Digital Bone Studios helps growing businesses replace scattered spreadsheets with practical CRM systems built around the way they actually work.

Book your free Spreadsheet-to-CRM Assessment